

# Automated List Management🔗

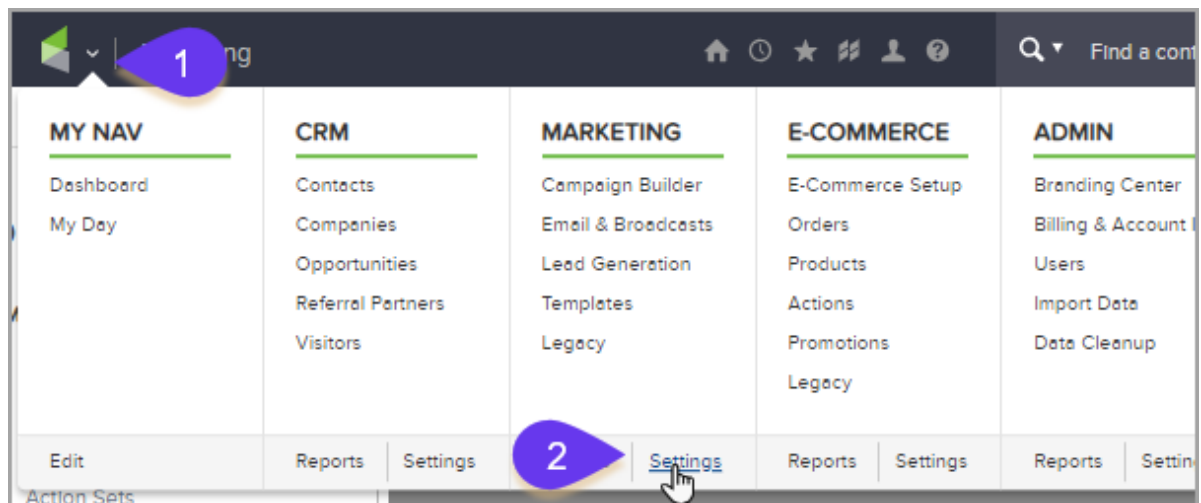
List Hygiene is a crucial part of email marketing best practices. With Automated List Management you have access to customize these two new email statuses automation.

- **Unengaged Marketable Status** - These contacts are eligible to receive your automated marketing emails, but are tracked as not having engaged for a certain number of months. The default time frame is 4 months.
- **Unengaged Non-Marketable Status** - These contacts will no longer be eligible to receive your automated marketing emails unless they engage with an email they've already received from you or submit an Infusionsoft web form.

Set a "contact engagement threshold" (in months) which identifies and sets these statuses automatically.

## Steps to setup Automated List Management

1. Go to Marketing > Settings in the main menu



2. Click on Automated List Management

A screenshot of a settings menu. The menu items are: Action Sets, Lead Sources, Campaign Categories, Automated List Management, and Email Authentication. A hand cursor is pointing at 'Automated List Management', which is also highlighted by a blue callout bubble containing the number '3'. To the right of the menu, there is a 'Country Code:' label followed by an input field. On the far right, partially visible, are the labels 'Doubt' and 'Gene'.

3. Click **Save Email Address Status Limits** when finished

A screenshot of the 'Save Email Address Status Limits' configuration screen. It features a toggle switch for 'Enable Unengaged Non-Marketable Status' which is currently turned 'On'. Below this is a text input field for 'Unengaged Non-Marketable Status Threshold' with the value '12'. A green button labeled 'Save Email Address Status Limits' is at the bottom right, with a hand cursor pointing at it.

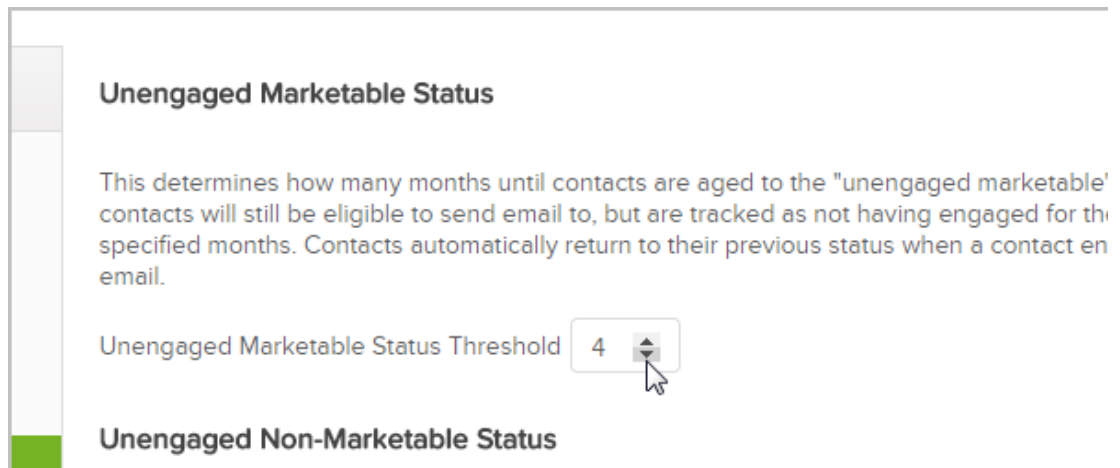
## Unengaged Marketable Status

These contacts will still be eligible to receive your automated marketing emails, but are tracked as not having engaged for the number of specified months. The default time frame for this status is 4 months - which is the hard-coded policy currently in place.

Based on this threshold, after 4 months with no engagements (opens, clicks, web form submissions), all contacts with confirmed or unconfirmed email status will automatically move to an Unengaged Marketable status.

In this status, contacts are still eligible to be sent automated marketing emails,

but keep in mind that no engagement after 4 months increases risks for excessive spam complaints or hard bounce s due to email accounts becoming inactive over time. Once these contact re-engage with your marketing efforts (open, click, or submit a web form) their email status will return to the previous state.



**Unengaged Marketable Status**

This determines how many months until contacts are aged to the "unengaged marketable" contacts will still be eligible to send email to, but are tracked as not having engaged for the specified months. Contacts automatically return to their previous status when a contact en email.

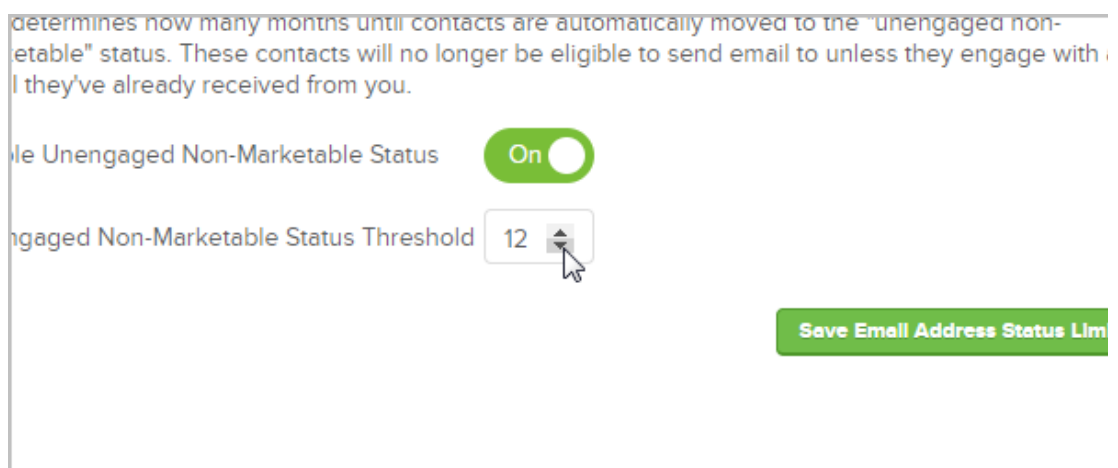
Unengaged Marketable Status Threshold

**Unengaged Non-Marketable Status**

## Unengaged Non-Marketable

These contacts will no longer be eligible to receive your automated marketing emails unless they re-engage (open, click, web form submission.) If they re-engage, their email status will return to its previous state.

Toggle this **On** and set your timeframe. The default timeframe recommendation is **12 months**, but you can adjust **1-24 months** depending on your preference. It must be equal to or larger than the Unengaged Marketable threshold.



determines how many months until contacts are automatically moved to the "unengaged non-marketable" status. These contacts will no longer be eligible to send email to unless they engage with you or they've already received from you.

Enable Unengaged Non-Marketable Status ☒ On

Unengaged Non-Marketable Status Threshold

**Save Email Address Status Lim**

You can also disable this functionality by toggling the switch to the **OFF** position.

### Unengaged Non-Marketable Status

This determines how many months until contacts are automatically moved to the "unengaged marketable" status. These contacts will no longer be eligible to send email to unless they eng email they've already received from you.

Enable Unengaged Non-Marketable Status

On

Unengaged Non-Marketable Status Threshold

12

Save Email Address